COMMENTARY CORNER

By Franchellie Cadwell

Tarzan pleads for help

When Jane and Tarzan were dating, Jane used Bonne Bell, Cover Girl, Yardley, Herbal Essence, Blue Grass and Charlie. After Jane and Tarzan married and had "Boy," they left Manhattan for a two bedroom tree house in Bronxville.

Jane, older now, uses Clinique treatment products, and recently bought Aapri and Silkience. Her makeup is mostly Lancome, although she has a yen for Aziza mascara and Max Factor's foundation. She has a half-dozen nail polishes, mostly Revlon. She cares for her hair with Sassoon, Clairol and Flex, and her body with Jean Nate, a Loofa sponge, something for cellulite, and Pretty Feet & Hands. Her fragrances range from Jontue to Opium and she plans very soon to buy or be given Anais-Anais and Missoni.

Thanks to you, of the cosmetics and fragrance industry, Jane is anything but plain. You have sold her to a fare-thee-well. She spends a beautiful $5 billion a year on cosmetics and fragrances because you've analyzed her psyche, you have your finger on her pulse, you know what makes her tick and what ticks her off. Above all, you know why she buys cosmetics.

So why haven't you done it for Tarzan?

All the average Tarzan does is scrape his whiskers away with a sharp instrument, then puts on some aftershave that dries his skin even more. The fact that aftershave burns makes it okay for it to have a little fragrance.

So why, when Jane is anything but plain, is Tarzan still primitive?

Why has the men's fragrance and cosmetics business never taken off?

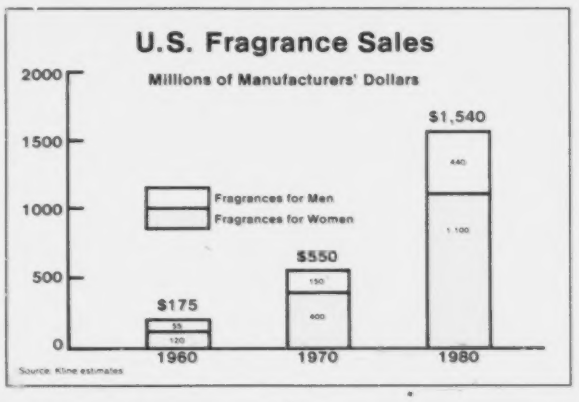
Why is Tarzan so uninterested that if somebody didn't buy fragrance and aftershave for him he'd probably just as soon go without.

The men's fragrance and cosmetics revolution was supposed to happen in the '70s. It didn't, so the experts postponed it to '80s. Now they're saying mid '80s. Will they still be predicting it in the '90s?

Will men's fragrance and cosmetics be the revolution that never comes? Is it that man's desire to look and smell beautiful can't be awakened, or is it that the industry doesn't know how to awaken it? I think that you get deep inside a woman's head and push buttons but that you speak superficially to men. Instead of looking at the male consumer, I think you look at each other. Does *every* man want to smell like a cowboy? I suspect the industry has never really studied men. The American man is treated like one huge homogeneous mass.

But society has changed men. Traditionally, man was the strong one, and woman was weak. Now she may be able to do more pushups than he. She may spend her days behind a bigger executive desk than he does. Sexually, he was the aggressor. Now she may be.

Whatever, Tarzan has changed, and today he is a whole bundle of different things. Yet, the industry is sending him fragrance and cosmetics messages from 20 years back.



Men are living longer, working longer, reentering the marriage market more often. Society has told men they should look *young* and *fit*. Yet an obvious category, hair coloring, hasn't even been made acceptable to men. Only about one-third of men think hair coloring is okay, and then, for somebody else. Only 6% of men color their hair. The men's hair coloring category is a mere $17,000,000 compared to women's at $300,000,000.

Despite intense pressures for a man to look young when he's staying on the job longer, and more youthful subordinates may be bucking for his job, 94% of men *don't* color their hair.

The men's hair coloring category is at least 25 years behind women, when Clairol first said, "Does she or doesn't she."

Women's attitudes don't help. Although they accept hair coloring for themselves, they do not for their men.

And of men who color their hair, at least a third use women's products.

If there ever was an opportunity, it's for the adroit marketer of a better formulated, better positioned, better advertised hair coloring product for men.

What about fragrances? Here a man has choices, but does he take advantage of them? He can smell like English leather, like Joe Namath, like a designer, like a cowboy, or a polo player. How does the fragrance business motivate men? Here are some typical advertising lines:

"The ultimate in men's fragrance."

"Inspired by his image. Created for yours."

"The first really new men's fragrance since Brut."

Compare these with the advertising for women's fragrance entries in the last seven or eight years:

"Charlie"—just the name conjures it all up.

"Jontue"—Sensual but not too far from innocence.

"Enjoli"—The eight hour perfume for the 24 hour woman.

Women's fragrances have become so motivating, a woman no longer waits for a man to buy it for her. Nearly half the time she buys it herself. Not men. They can wait. And so does the men's fragrance business. Seventy per cent of the time a woman makes the first time fragrance purchase for a man.

The American male is not a stereotype, and he's not a throw-back. With a little help from the cosmetics business, men's skincare and, yes, even cosmetics can become a habit.

We're not saying repackage women's products and adapt their positionings. We do say tap the needs men have as you have tapped those of women. Be original in selling men, but be as good as you are at selling women. Don't say, as one cosmetics tycoon remarking on creativity recently did, "We must be more original. We must find more small companies to copy."

Men have been reared and trained to hide their true feelings. Maybe that's why we traditionally have had such a hard time getting beneath their surface, getting at their real needs.

Remember, it's the male lion who has the mane, the male peacock with the plumage. George Washington wore a wig. Louis XIV used eyeliner. Ronald Reagan looks great on tv. Why not Tarzan? AA

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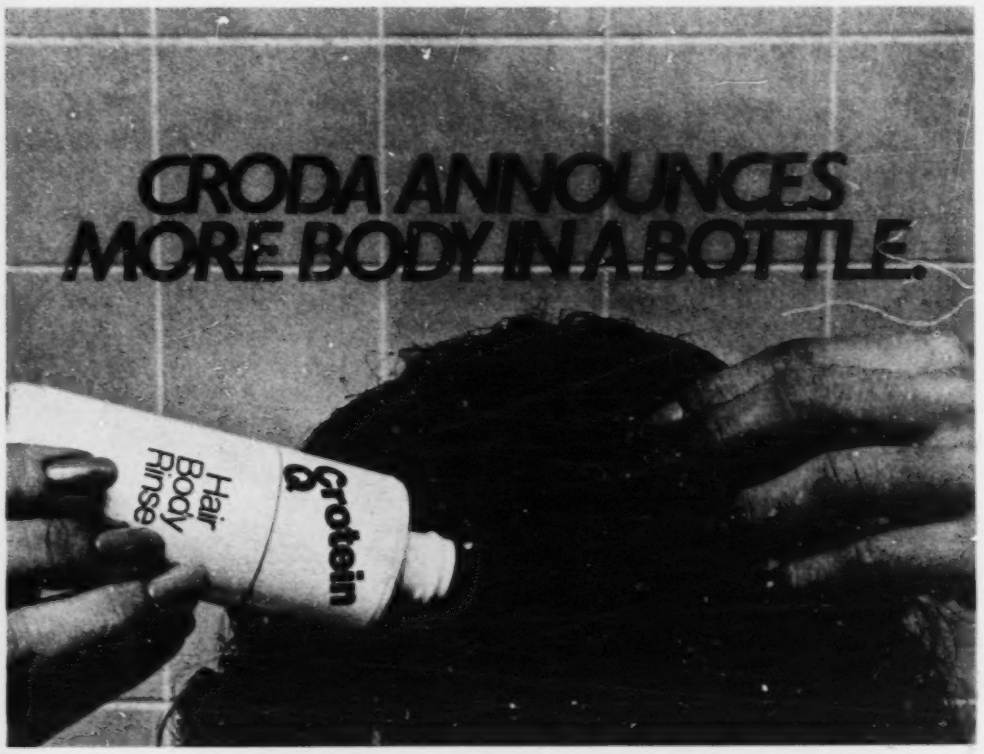

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Fragrances sniff (blossoming?) areas

But planning's a must

By Letitia Mulcay Makai

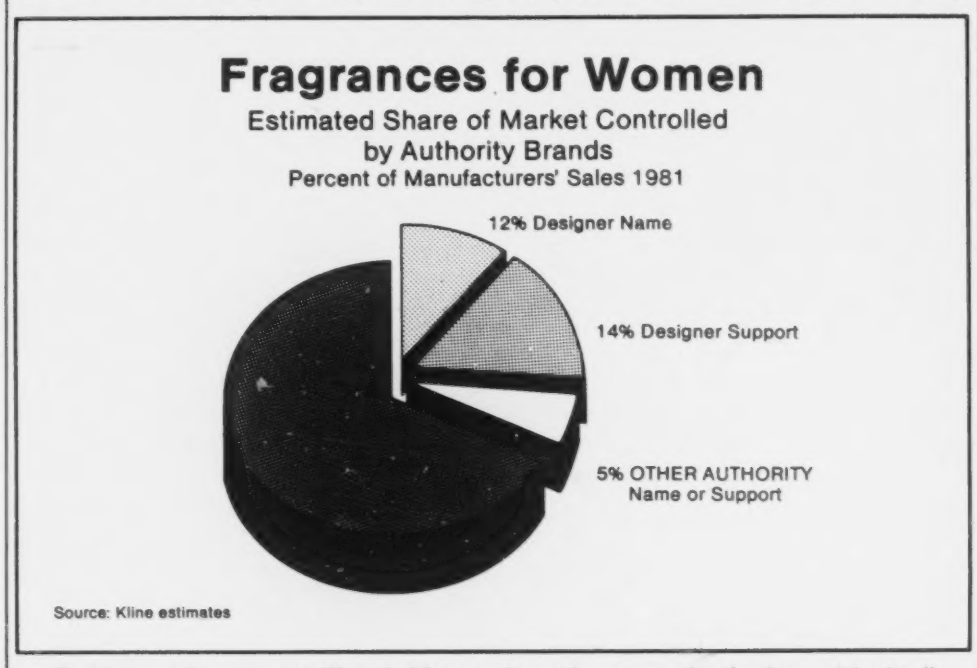
The U.S. fragrance industry, similar to many consumer goods businesses, is slowing down, and only modest gains are expected for several reasons: Slower population growth; increased pressures on dwindling disposable incomes; and basically, fragrances are already being used, in their traditional form, by a majority of men and women.

During the '60s, real growth averaged about 8% annually, double the estimated 4% per year growth during the '70s. Real growth will continue to slow in the 1980s and will likely average about 3% or less annually, excluding price increases. It is tough on any industry to adjust from rising sales to sluggish growth).

In any rapidly growing area, even mediocre marketing may be rewarded with a measure of success. By contrast, during difficult times, an almost flawless execution of product planning and introduction is necessary for only modest sales success.

Thus, unit sales for fragrances are likely to be disappointing during the 1980s unless fragrance marketers buckle down and evaluate their, and their competitors', plan, and analyze some of the changes that have taken place over the past few years that do have potential for increasing sales. Although not new, the proliferation of changes in the market is perhaps evidence of the more competitive nature of the fight for market share. Some of the strategies include: Increased sampling, extending fragrance lines to include more ancillary items, and using designer and celebrity names for new fragrances to provide "authority."

Increased sampling. Free sampling has always been important for fragrance products. In recent years, however, the abundance of new brands vying for attention has increased the need to sample. More fragrances are now available for trial in counter testers as well as in small fragrance-filled vials or scented packets that the consumer can take home and try before purchasing.


Fragrances for Women
Estimated Share of Market Controlled by Authority Brands
Percent of Manufacturers' Sales 1981
12% Designer Name
14% Designer Support
5% OTHER AUTHORITY Name or Support
Source: Kline estimates

Fragrances for women will probably get a boost from more "authority positioning."

Emphasis on ancillary items. Because several other toiletry categories are growing more rapidly than fragrances, marketers have introduced line extensions in these areas. For example, to participate in the rapidly growing treatment market, many fragrance lines have introduced scented skincare products.

Another rapidly growing market over the past two years has been liquid soap. Such fragrance lines as Cachet, English Leather and Jean Nate now include their own versions of liquid soap.

New introductions using authority support. A major trend over the past five years is the use of an outside authority, a designer or celebrity, to sponsor a fragrance. While such authorities as fashion designers have long influenced fragrance trends, more and more designers and celebrities are associated with today's new fragrances. A large part of both the women's and men's fragrance market is controlled by brands that have gone to an outside authority to develop an image. This "authority category" can be further divided into subcategories:

Designer names include fragrances named after designers, including Halston, Oscar de la Renta and Sophia.

Designer support includes fragrances that go by their own name but are given support and are marketed under a designer's name.

These include Yves Saint Laurent's Opium, Diane Von Furstenburg's Tatiana and Jean Cacharel's Anais Anais.

Letitia Mulcay Makai is project manager at Charles H. Kline & Co., New York.

Technology makes scents

By Theodore J. Gage

Technology has given fragrance marketers a break. Scents that previously entailed crushing upwards of 1,000 rose petals for one ounce of very, very expensive essence can now be faithfully reproduced in a laboratory for a fraction of the cost.

And those same scents that previously nestled behind ears now can be economically produced for use in everything from after-bath colognes to room fresheners.

At the same time, marketers are embarking on new advertising waters, designing campaigns to educate American consumers to the full range of uses of scented products, thereby stimulating consumer interest in and demand for scented products.

The fragrance industry hopes the hand-in-hand effort with marketers will help pull the business out of its sales lull. If the industry has anything to say about it, scents like rose, amber and gardenia will no longer be limited to perfumes and colognes.

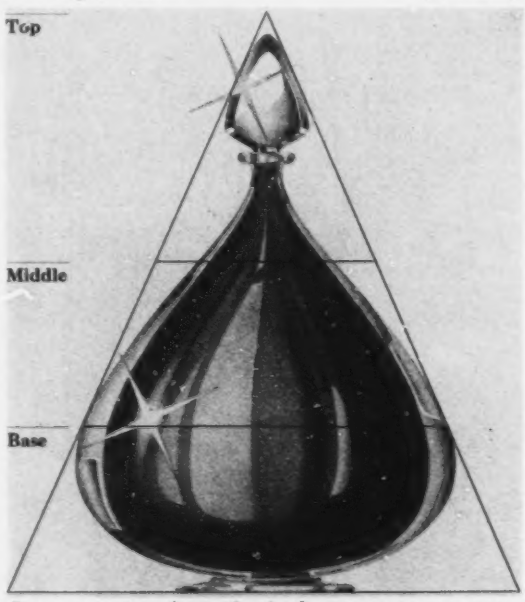
"We haven't scratched the surface in the area of using fragrance in our daily lives at home and at work," said Tom Cannariation, vp, Naarden International USA, New York. "We are encouraging marketers to do more testing of the impact of fragrance on people's emotions and attitudes. They are finding it has a much greater effect than they expected."

Officials at another fragrance producer, Ramsey, N.J.-based Proprietary Perfumes Ltd. (PPL), convinced a shampoo marketer to conduct a test using the same shampoo with different fragrances. The shampoo manufacturer discovered that consumers reacted positvely to one of the shampoos, saying it made their hair both cleaner and fresher.

But was there any other difference among the various shampoos, aside from the fragrance? Only the smell, said PPL officials. Otherwise, the product was constant.

How does a fragrance company work with a client?

PPL, for example, encourages its clients to draw up a position paper on a new product, stating desired goals—that i should have a good smell: Fresh, clean, refreshing, and so on. Then the fragrance manufacturer can recommend a few of the thousands of available scents, emphasizing those that work on an almost subconscious level to stimulate in consumers the desired sensations.



Lower costs of synthetic fragrances are enabling perfumes once confined to bottles to permeate rooms, cabinets—even furniture polish.

Expanded use of fragrance in a variety of products is beginning to take hold in a number of areas, says Jan Fox, vp-marketing for PPL. "We're seeing a greatly expanded use of fragrance for items like fragrance candles, scented drawer liners, potpourris and room fresheners.

In many cases, room fresheners are being positioned or repositioned not as coverups for odors, but as atmosphere enhancers. Consumers are being told they don't have to use a room freshener or scent just to rid a room of unwanted odor.

Scents and room fresheners can also be used to create moods—as incense has been used for centuries. But only recently, say Mr. Cannariation and Ms. Fox, have marketers in the U.S. caught on to that concept—long established in Europe—ever since rose petals, leaves and pine needles were strewn on the floors of medieval castles.

Also, the fact that fragrance essences no longer cost a fortune has encouraged their use in traditionally unlikely products, such as furniture polish.

In fact, there is a growing number of product lines—like Faberge's Brut or the Aramis line—that offer a wide range of products with complementary or similar fragrances.

Estee Lauder, for example, has introduced a line of fragrance candles and room sprays with scents, such as Youth Dew and Aliage, not traditionally used in room freshening products. Lauder also has available what may be the ultimate in a luxury cold water wash for lingerie, White Linen.

Also, because the perfume and cologne business has been flat, the ensuing intense competition has helped forge new, sometimes startling, marketing approaches, including novel fragrances with names like Opium and STASH.

The initial reaction to Yves Saint Laurent's Opium in the U.S. was negative. Now, however, it is selling well.

A more recent entry into the perfume fray is STASH, a men's cologne that purportedly smells like the blossoms of marijuana flowers and drives, says its creators, women "bananas."

Although Ms. Fox says that most fragrances and most product categories that use scents

The other authority category includes such brands as Sophia and Barbara Cartland, both which carry a celebrity's name, as well as fragrances promoted by celebrities, for example, Shulton's Cie, supported in advertising by Candice Bergen and Max Factor's Epris, promoted by Jaclyn Smith.

Providing new introductions with authority names and images is one method of reducing the risks associated with the launch of an unknown product. The necessary process of educating the consumer regarding the fragrance image is then complete even before the fragrance is on the market. By contrast, with an ordinary name, the marketer must educate the consumer with the concept and positioning of the product before the consumer can be sold.

Of the top seven suppliers of women's fragrances, four—Revlon, Squibb Corp., American Cyanamid Co., and Pfizer—have authority fragrances. Of the three remaining companies—Avon, Chesebrough-Pond's and Estee Lauder—at least two, Avon and Chesebrough-Pond's, have considered such products and are likely to introduce authority or designer-backed brands in the future.

Designer name brands controlled roughly 12% of sales of women's fragrances in 1981. Leading brands are the well-established Chanel No. 5, Oscar de la Renta for women and Halston for men. In addition, there are many smaller designer name brands including Calvin Klein, Oleg Cassini and Bill Blass.

An even larger segment of the women's market uses brands with *designer support.* Such products are sold under their own name, for example Opium, but carry the designer's signature in packaging, advertising and promotion. This allows one designer to promote several fragrances in self-competition. Designer supported brands represented roughly 14% of total sales of women's fragrances in 1981. An additional 5% of sales are from brands that are *other authority* names or support.

In total, authority brands controlled 31% of sales of women's fragrances in 1981. The balance, 69%, consisted of fragrances named after flowers, herbs and other vegetation (Blue Grass, Ginsing), places, imaginary people, emotions (Hope and Love), precious materials, loving expressions (Here's My Heart) and combinations of the above.

Over the next 10 years, more fragrance brands in the women's and men's markets will be backed by sports, music, fashion and other figures.

By 1990, possibly more than 50% of total fragrance sales will be from products with some type of authority support to help insure success. Marketers will also be evaluating various strategies to increase sampling, expand fragrance lines into new areas of growth and maintain excitement in fragrance sales.

Although the fragrance industry thrives on changing fashions and seasonal promotions that typically require a short-range outlook, future growth will require more long-range planning in order to thrive during the slow times ahead. AA

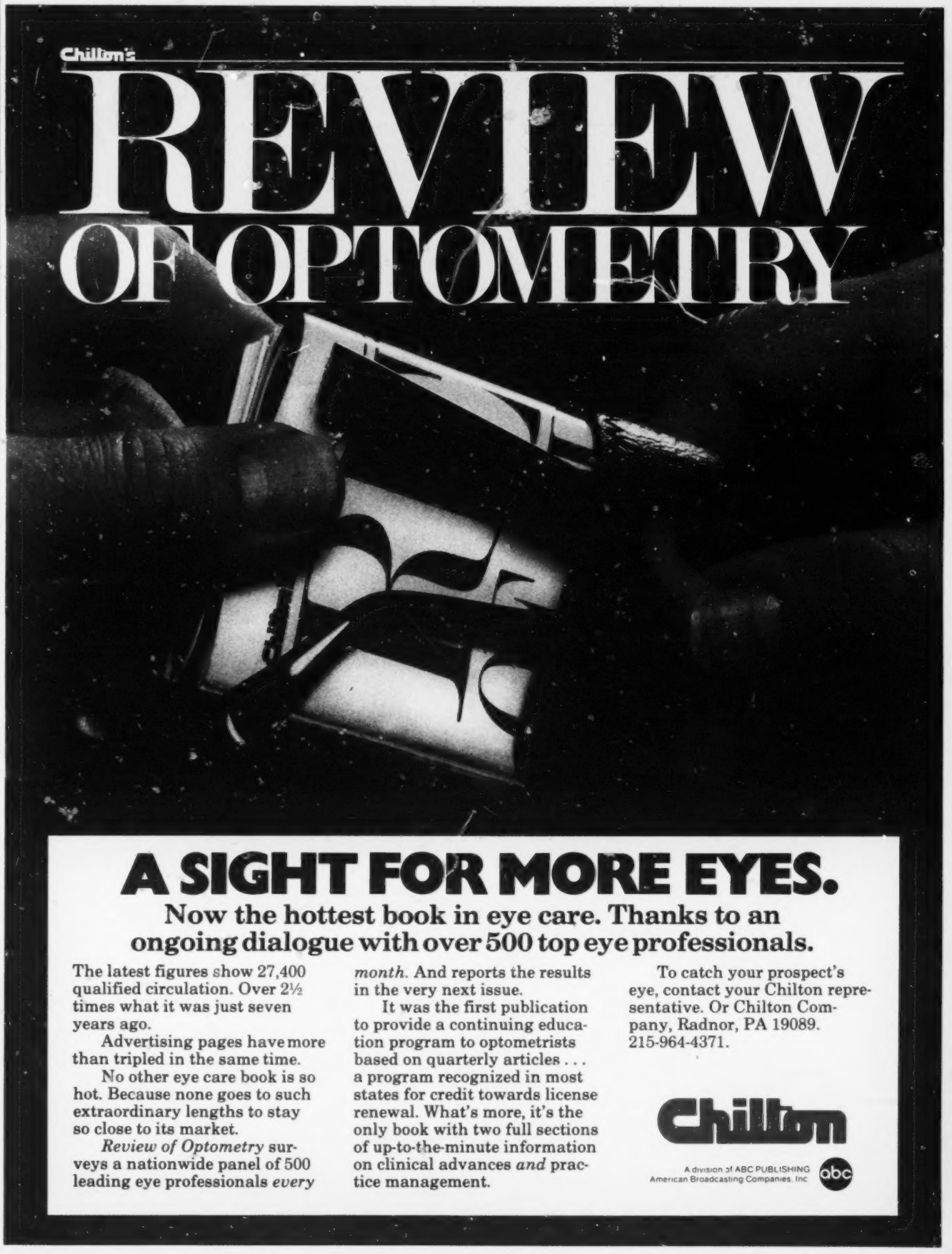
have already been exploited, the key, she says, to getting more people to try perfumes and colognes is to educate consumers about their benefits.

Mr. Cannariation agrees, saying that only a small segment of U.S. consumers "even understands the difference between eau de cologne, eau de toilette, perfume and cologne. And very few understand the various uses of such products. "Those are the consumers who will make the market grow," he says.

Both fragrance experts say a preponderance of scented products could create a dilemma for consumers, an odoriferous confusion. Picture a consumer on his way to work in the morning. His hair has a lingering scent of roses; his deodorant is sandlewood; and his perfume musk. But marketers and consumers, the fragrance experts say, will become sophisticated about when and where to use fragrance —and how much.

Synthetic scents are capable of lasting hours longer than the traditional natural varieties.And the quality of the synthetics has vastly improved in recent years.

Yet neither Ms. Fox nor Mr. Cannariation see deodorant or shampoo putting such classics as Chanel No. 5 out of business. Instead, they say, innovation will increase the use of scents. So for makers of the stuff, this could mean a profitable and fragrant future. AA



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